

Le, Uyen-Chau

**From:** Kazimi, Hani  
**Sent:** Wednesday, November 24, 2004 1:59 PM  
**To:** Le, Uyen-Chau  
**Subject:** RE: 10/726,754

Try (705/35, 36, 37, and 42) some key words you might want to consider:

(track\$ or updat\$ or match\$ or recocil\$) near3 financial near (transactions or records or accounts), then narrow it down by specific claim language.

Good luck  
Hani

-----Original Message-----

**From:** Le, Uyen-Chau  
**Sent:** Monday, November 22, 2004 10:05 AM  
**To:** Kazimi, Hani  
**Subject:** 10/726,754

Hi,

My name is Le. I'm working in art unit 2876. I'm currently working on a case that is related to a banking system. Would you please help me with some search (i.e., search areas in 705), I really appreciate it! The claim is as follows:

A method for reconciling a financial account of a user on a user device, comprising:

accessing a user list of transactions entered by said user;  
downloading a financial institution list of transactions from a financial institution;  
storing said financial institution list of transactions on said user device;  
comparing said user list and said financial institution list item by item;  
providing a reconciliation function for each item on both of said lists;  
comparing said transactions to match transactions on said financial institution list to transactions on said user list;  
identifying unmatched transactions;  
attempting to match said unmatched transactions, absent user input, according to predetermined criteria to provide proposed matches;  
presenting said proposed matches to said user;  
accepting, on an item by item basis, a confirmation of said proposed matches by said user;  
presenting to said user a first group of transactions on said user list, but not on said financial institution list;  
presenting to said user a second group of transactions on said financial institution list but not on said user list;  
providing a user input capability for matching items from said first and second groups; and  
providing an indication whether an item has been cleared for each item upon completion of said reconciliation function.

Thank you very much!

Sincerely,